

Employee Self-Service

Updating W-4 Tax Information

Employees will have access within Employee Self-Service that will allow the ability to view and/or update their Form W-4 Tax Information.

You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Federal income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You may also specify that an additional dollar amount be withheld. You can file a new Form W-4 anytime your tax situation changes and you choose to have more, or less, tax withheld.

Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

Important Reminders:

- For detailed information on how to complete your W-4, please refer to the IRS W-4 page: http://www.irs.gov/file_source/pub/irs-pdf/fw4.pdf
- Your online W-4 submission updates your Federal Tax Data only. If you need to update your State Withholdings, you must submit a written request.
- Employees of Agencies that utilize the MassHR Employee Service Center should contact the Employee Service Center with W-4 related questions by calling 1-855-4HR-SPPT (1-855-447-7778) or for TTY users: (617) 248-0546.
- Employees of Agencies that do not use Employee Service Center should contact their Agency Human Resources or Payroll Department with W-4 related questions.

Quick Tips:

- These instructions are for users with Auto Forms mode turned on
- For Users who don't use Auto Forms mode, remember you must press Enter while in an Edit field to enter into Forms mode and you must press the + key on the number pad to exit out of Forms mode.

W-4 Tax Information:

Step 1. Log into Employee Self-Service using your User ID (employee id) and password. Press Insert + F5 to pull up the Forms List Dialogue box. Press the letter U to ensure that the User ID field is highlighted (should be first on the list), hit enter to place

your cursor in the User ID field. Type your User ID into the field and press Tab to land in the Password Edit field and type in your Password. Press Tab again to put focus on the Sign In Button and press ENTER. This displays the Employee Self-Service Home page.

Step 2. Press Insert + F7 to access the Links List and press the letter S until you hear SELF SERVICE FOLDER link and press Enter. You will arrive on the Self Service page.

Step 3. Press Insert + F7 to access the Links List and press the letter P until you hear the PAYROLL AND COMPENSATION FOLDER link and press ENTER.

Step 4. Press Insert + F7 to access the Links List and press the letter W until you hear the W-4 TAX INFORMATION link and press ENTER. You will arrive at the W-4 Tax Information Page. Once within W-4 TAX INFORMATION page, you are presented with existing W-4 Tax Information. Press the letter H to quickly navigate until you hear the W-4 Tax Information Header and press the DOWN Arrow in order review all of the information on the page

Step 5. Press the DOWN Arrow to review and verify your Home Address and Mailing Address for your W-4 Tax Information.

Note: If you need to you update either your Home and/or Mailing Address, please refer to the Job Aid on the MassHR Employee Service Center Website: **Employee Self-Service: Personal Information Job Aid for JAWS Users**, for further information.

Step 6. Press the DOWN Arrow until you hear **Enter total number of Allowances you are claiming** in order to put focus in the EDIT BOX. Press the Delete button in order to delete the information present and update your allowances as needed.

Step 7. Press the DOWN Arrow in order to put focus in the **Enter Additional Amount, if any, you want withheld from each paycheck** EDIT BOX. Press the Delete button in order to delete any information if present and update your additional withholding as needed.

Step 8. Press the DOWN Arrow in order to put focus in the **Indicate Marital Status** Radial Button. Press UP and DOWN Arrow Keys in order to select a Martial Status of either Single or Married and press the Spacebar to check or uncheck the selection.

Step 9. Press the DOWN Arrow in order to put focus in the Check box **Check here and select Single status if married but withholding at single rate**. Press the Spacebar to check or uncheck the Check box. **Note:** If married, but legally separated, or spouse is a nonresident alien, select 'Single' status.

Step 10. Press the DOWN Arrow in order to put focus in the Check box **Check here if your last name differs from that shown on your social security card**. Press the Spacebar to check or uncheck the Check box. **Note:** You must call 1-800-772-1213 for a new card.

Step 11. Press the DOWN Arrow in order to put focus in the **I claim exemption from withholding for the year** EDIT Box. Press the Delete button in order to delete the information present and update the Tax Year you are claiming exemption.

Step 12. Press the DOWN Arrow in order to hear Claim Exemption conditions.

- In order to claim an exemption from Federal Withholding, as an employee, you must meet BOTH conditions list below:
 - 1) Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability; AND
 - 2) This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

Step 13. If you satisfy both conditions, Press the DOWN Arrow in order to put focus in the Check box **Check 'Exempt' here if you meet both conditions**. Press the Spacebar to check or uncheck the Check box.

Important: If you claim exemption, you will have **NO** Federal Wages showing in Box 1 Wages, tips, and other compensation of the W2. In addition, employees who claim Exempt must resubmit their Exempt Status by February 15 every year. Please be sure to verify the information you have entered is accurate.

Step 14. Press the DOWN Arrow in order to hear the statement “Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.” Press the DOWN Arrow in order to put focus on the SUBMIT button and press ENTER in order to certify your W-4 selection.

Step 15. Once you have selected the submit button, a message box will inform you that you will be directed to the Verify Identity page and explain how to navigate. Press the Spacebar to activate the OK button in order to continue verification of your identity. Your focus will already be in the Password EDIT box when you arrive on the Verify Identify Page. You will need to verify your identity by typing in your Self-Service password.

Step 16. Press the TAB to put focus on the CONTINUE Button and press Enter. You will arrive at the W-4 Tax Information Submit Confirmation Page.

Step 17. Press the letter H to hear the W-4 Tax Information header. Press the Down Arrow in order to review the Submit confirmation message. Continue to press the Down Arrow to navigate to the OK button and press Enter to confirm your W-2/W-2c Consent submission.

Step 18. Press Insert + F7 to access the Links List and press the letter R until you hear the RETURN TO SELF SERVICE link and press Enter in once you have completed your W-4 Tax Information.